

ePROCUREMENT 8.8

ATTACH A DOCUMENT TO A PO

Accounts Payable (AP) needs access to subcontract pricing in order verify invoiced prices. There are several ways to include pricing information in POs:

1. By including prices in the POs Line Description
2. By attaching a file that has the vendor's price list (in Acrobat, Excel, Word, Web page link) or
3. By attaching a blanket subcontract (BSub) document or other file that has prices.

For standardization, attachments should be attached to PO Header Comments rather than Line Comments. PeopleSoft allows you to attach any kind of document (xls, doc, pdf) as an attachment.

This topic will show you how to attach a document to a PeopleSoft PO.

- Bring up the PO in **eProcurement | Buyer Center | Manage Purchase Orders**
- Click the **Edit Comments** link. (If there are no previous comments, it says **Add Comments**)

Maintain Purchase Order

Purchase Order

Unit: LBNL
PO ID: 6802060
Change Order: 1
Copy From: [Dropdown]
Hold From Further Processing: ☐

PO Status: Dispatched
Budget Status: Valid

Vendor: APPLIED BIOSYS
Vendor ID: 0000009170
Buyer: SMNOLAN
PO Reference: Online Sourced from Req

Backorder Status: None
Receipt Status: Not Recvd
Dispatch Method: Phone
Amount Summary:
Merchandise: 110200.00
Freight/Tax/Misc.: 0.00
Total Amount: 110200.00 USD

Header Details | PO Activities | Add Ship To Comments
Edit Comments | Document Status | Requisitions | Mod Table Details

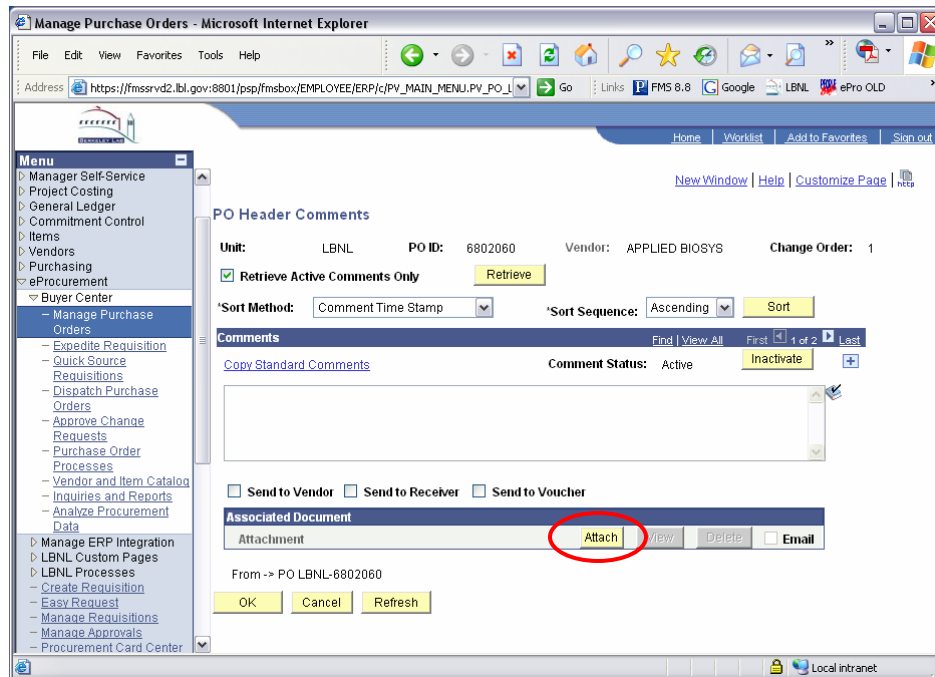
Lines

Line	Item	Description	PO Qty	UOM	Category	Price	Amount	Status
1		RUSH new blanket cat 20000 w/APplied Biosystems for Genomics West. LSD PJ Jan-Fang Cheng, 84-236 to supply sequence buffers, capillary arrays, POP7 bottles etc per quote #20301703 attached. Will replace 6705021 w/lower pricing.	104724.1600	EA	LABSP	1.00000	104724.16	Active
2		Increase cat 20000 6802060 ABI for sequencing buffers for Genomics West Rubin lab, PP 10.1.05-9.30.06, quote #20312273 attached; current PO pricing exp 9.30.05.	5475.8400	EA	CHEMN	1.00000	5475.84	Active

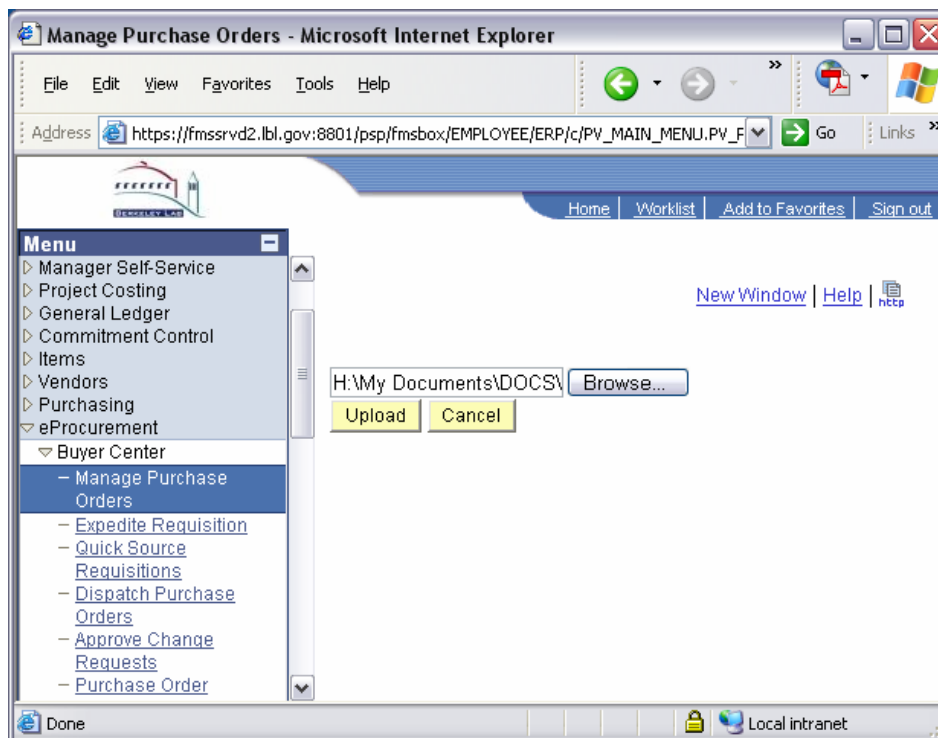
View Printable | Print PO Detail? | Print Trial PO/Copy? | Go to: More ...


Save | Return to Search | Notify | Refresh | Add | Update

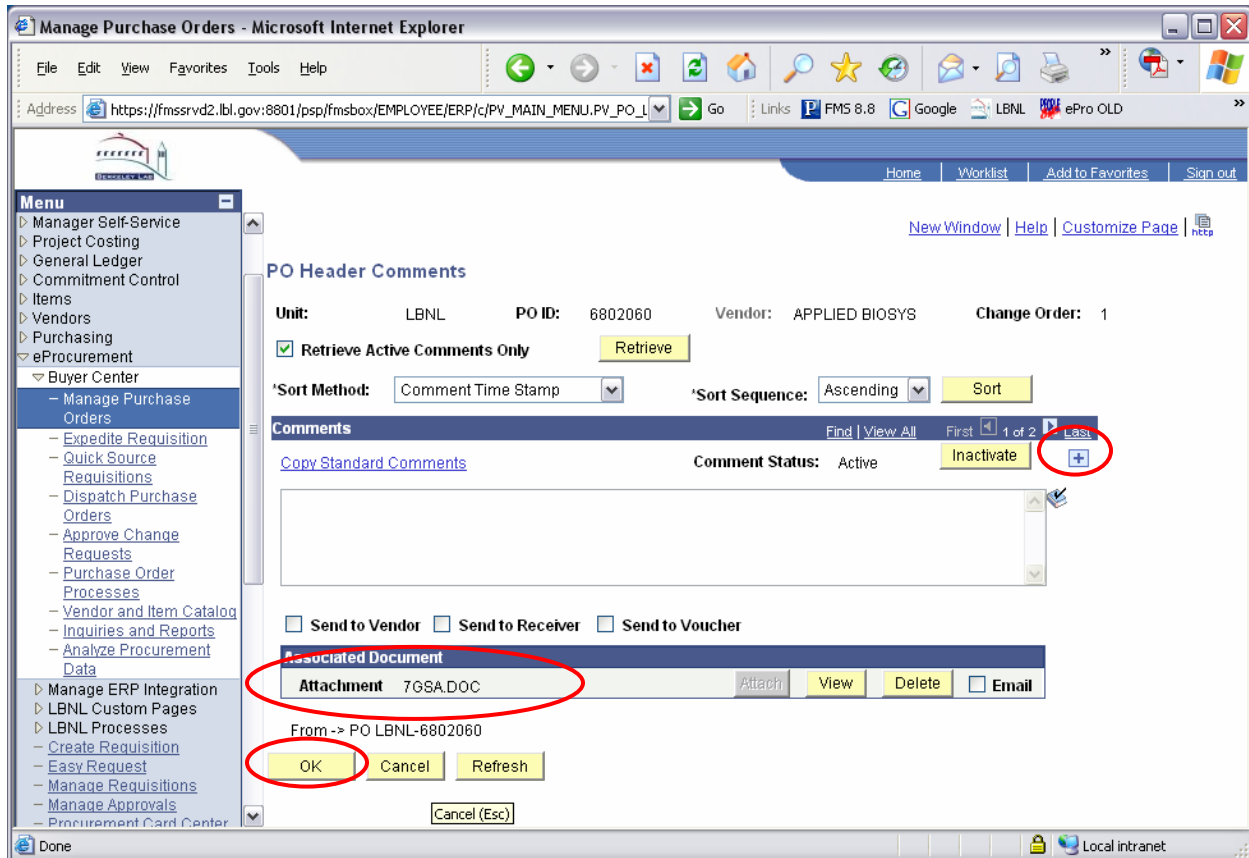
- Click the **Attach** button.



- Click the **Browse** button.
- Locate the file on your computer that contains the pricing information.
- Click the **Upload** button.



- The file name is shown next to *Attachment*.
- Click the **OK** icon to return to the main PO or
Click the  icon to add a new Comment row to add an additional attachment.
- On the main PO page, click the **Save** button to save the PO & its new attachment(s).



Manage Purchase Orders - Microsoft Internet Explorer

Address: https://fmssrvd2.lbl.gov:8801/psp/fmsbox/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_PO_I

Menu

- Manager Self-Service
- Project Costing
- General Ledger
- Commitment Control
- Items
- Vendors
- Purchasing
- eProcurement
- Buyer Center
 - Manage Purchase Orders
 - Expedite Requisition
 - Quick Source Requisitions
 - Dispatch Purchase Orders
 - Approve Change Requests
 - Purchase Order Processes
 - Vendor and Item Catalog
 - Inquiries and Reports
 - Analyze Procurement Data
- Manage ERP Integration
- LBNL Custom Pages
- LBNL Processes
 - Create Requisition
 - Easy Request
 - Manage Requisitions
 - Manage Approvals
 - Procurement Card Center

PO Header Comments


Unit: LBNL PO ID: 6802060 Vendor: APPLIED BIOSYS Change Order: 1

☒ Retrieve Active Comments Only Retrieve

Sort Method: Comment Time Stamp Sort Sequence: Ascending Sort

Comments

Find | View All First 1 of 2 Last

Copy Standard Comments Comment Status: Active Inactivate 

☐ Send to Vendor ☐ Send to Receiver ☐ Send to Voucher

Associated Document

Attachment	7GSA.DOC	Attach	View	Delete	Email
From -> PO LBNL-6802060					

OK Cancel Refresh

Cancel (Esc)

Tip: Old price attachments should be hidden when there are new price attachments. To do this, click the **Inactivate** button to inactivate a comment and its attachment. This changes the comment to *Inactive*. By default, inactive comments will not appear when you view comments. You can still see them, however, by unchecking the "Retrieve Active Comments Only" box, clicking the Retrieve button, and clicking OK to override existing comments.

Individuals outside of Procurement can view PeopleSoft POs and attachments by going to the *Purchase Order Inquiry* page:

- Navigate to **Purchasing | Purchase Orders | Review PO Information | Purchase Order Inquiry** and search for the PO number you want.
- Click on the **Header Comments** link

Purchase Order Inquiry

Purchase Order

Unit: LBNL PO Status: Dispatched
PO ID: 6802060 Budget Status: Valid
Change Order: 1

Header

PO Date: 08/25/2005
Vendor: APPLIED BIOSYS
Vendor ID: 0000009170
Buyer: Nolan, Suzanne M
PO Reference: Online Sourced from Req

Backorder Status: None
Receipt: Not Recvd
☐ Hold From Further Processing

Amount Summary

Merchandise: 110200.00
Freight/Tax/Misc.: 0.00
Total: 110200.00 USD

Select Lines to Display

Line	Item	Item Description	Category	PO Qty	UOM	Amount	Status
1		RUSH new blanket cat 20000 w/A	LABSP	104724.1600	EA	104724.16 USD	Active
2		Increase cat 20000 6802060 ABI	CHEMN	5475.8400	EA	5475.84 USD	Active

- Click the **View** icon to see the attachment
- Click the View All in the blue bar to see all Header Comments and attachments.

PO Header Comments

Unit: LBNL PO ID: 6802060 Vendor: APPLIED BIOSYS Change Order: 1

☒ Retrieve Active Comments Only **Retrieve**

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending **Sort**

Comments

Comment Status: Active

Send to Vendor: N Shown at Receipt: N Shown at Voucher: N

Associated Document

Attached File: 7GSA.DOC **View**

From -> PO LBNL-6802060